Clearspan®

OpEasy® Basic Provisioning User Guide

Release 4.0

2827-006

2811 Internet Blvd
Frisco, Texas 75034-1851
Tel +1 469 365 3000
Tel +1 800 468 3266
www.aastrausa.com

6th Edition (August 2014)

Information in this manual may change with product revisions. Aastra® may add features or enhancements to the product(s) and/or program(s) described in this manual at any time.

Technical Publications freezes the information in this manual based on the specified software and hardware releases. Publications writers incorporate such changes into newly released publication editions. Publications writers will incorporate any modifications provided to them after the publication release date into the next scheduled release of the publication.

Aastra furnishes the application described in this manual under a license agreement and customers may use or copy information in the manuals only in accordance with the terms of the agreement.

Contact Information

Address any reader comments to:

Aastra USA Inc.
Technical Publications Manager
2811 Internet Boulevard
Frisco, TX 75034-1851

You may also send e-mail to **techpubs@aastrausa.com**

What to Expect when Contacting Company

Technical Publications will e-mail responses to customers within seven business days of the contact. Note that product support is not available through this e-mail address. For product support, contact Aastra Customer Technical Support (ACTS) at 1-800-729-1872. Aastra may use or distribute review comments and information without incurring obligation.

Trademarks and Acknowledgements

Product registered trademarks and copyrights of the products included in this publication include Clearspan® and OpEasy® as registered trademarks of Aastra Technologies Ltd.; Microsoft® Excel as a registered trademark of Microsoft Corporation.

Revision History

The following represents the revision history of this publication:

Revision Number	Date Completed	Point of Contact	Description
2827-001	04/25/2013	Aastra Technical Publications	Initial release of this publication.
2827-002	07/08/2013	Aastra Technical Publications	Updates and revisions for R 3.5.
2827-003	09/04/2013	Bev Marsh Aastra Pubs	Updates and Revisions for R3.6.
2827-004	04/2014	Aastra Technical Publications	Updates and Revisions for R3.9.
2827-005	06/2014	Aastra Technical Publications	R3.10
2827-006	08/2014	Aastra Technical Publications	R4.0

Table of Contents

Table of Figures

1 Overview

The primary purpose of the OpEasy® Provisioning application is to simplify the process of adding users, features, and devices to the Clearspan® system.

1.1 Administration Modes

There are two administration modes:

- **Basic OpEasy Admin**–Has little or no expertise on Clearspan, but can easily use Basic Provisioning to add, modify, and delete users on the Clearspan system. For this document, the Basic OpEasy Admin is a Department Administrator (DA) and has all of the possible functions that can be enabled for a DA.
- **Advanced OpEasy Admin**–Has considerable expertise with the Clearspan system. This administrator lays the groundwork for manipulating users such as creating devices, profiles, templates, etc. All of this is necessary for Basic Administrators to do their job. This administrator is usually a System Administrator (SA), an Enterprise Administrator (EA), or a Group Administrator (GA).

1.2 Basic Provisioning

This document provides instructions on adding, modifying, and deleting one Clearspan user and user's phone device at a time. It also provides instructions on adding and deleting multiple Clearspan users with their phone devices using Import.

1.3 References

Advanced provisioning topics such as assigning user features, exporting, phone templates, phone management, and group settings are covered in the *Clearspan OpEasy Advanced Provisioning User Guide*.

2 Logging In

Your system administrator will provide your username and password. Your system administrator will also provide the URL for your login, shown in red below.

1) Enter the URL (case sensitive) into your web browser. It will be similar to the following:

http://<Fully Qualified Domain Name> or <IP Address>/opeasy/

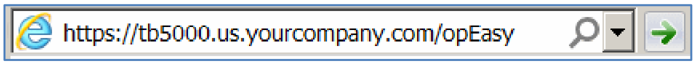


Figure 1 Explorer Search Box with URL

2) Enter the **User Name** and **Password** provided by your system administrator.

3) Click **Login**. The OpEasy main page displays as the following image.

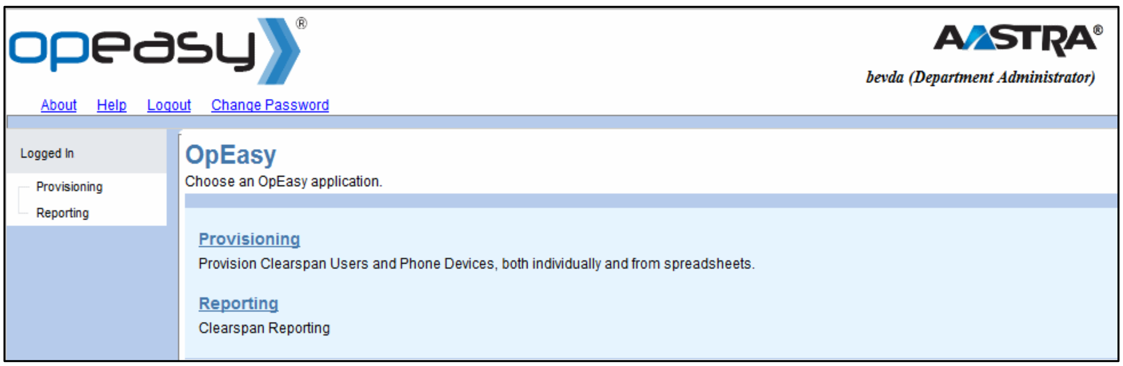


Figure 2 OpEasy Main Page for Department Administrators

4) Click on **Provisioning**. The Provisioning page displays as in Figure 3 Provisioning Main Page.

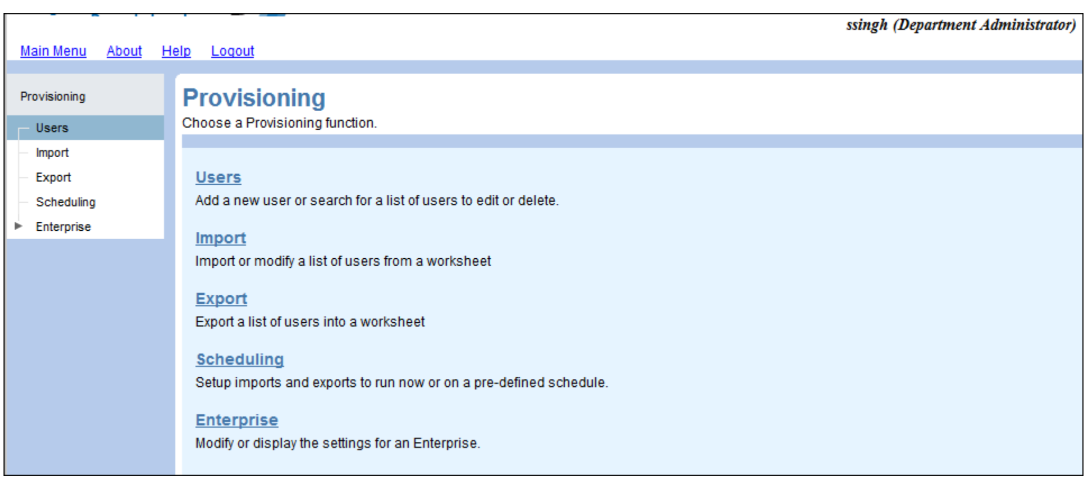


Figure 3 Provisioning Main Page

The options that you see, both on the main page and in the pages that follow for each function, depend upon licensing and your assigned user privileges. Direct any questions to your system administrator.

3 Adding a Single User

This chapter describes the process of adding a single Clearspan user.

When a new user is created, an email goes out to the user with instructions for phone setup.

3.1 User Add Page

1) From the OpEasy main menu, click **Provisioning**.

2) From the Provisioning page, click **Users** from the menu tree on the left, or click **Users** from the Provisioning menu. The Users page displays as in the following image.

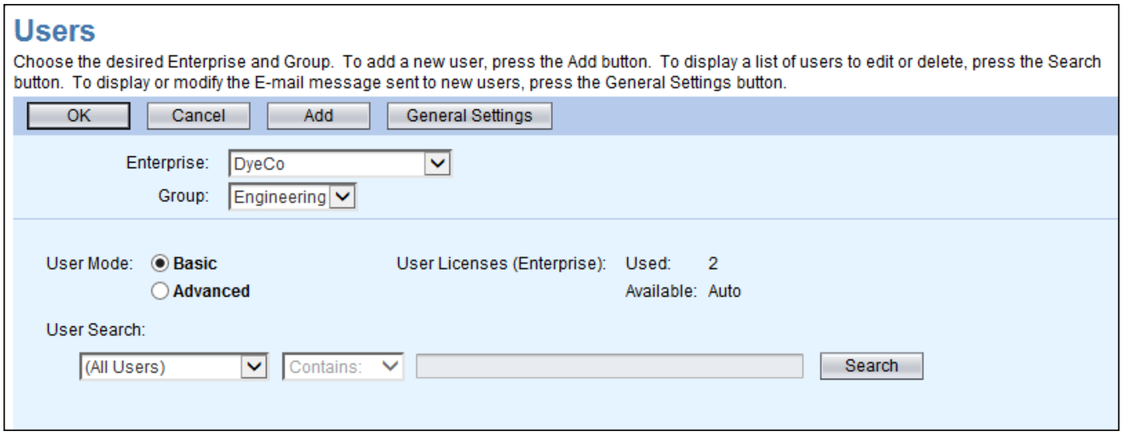


Figure 4 Users Main Page

The **Enterprise** and **Group** associated with this DA's login are displayed. If the login is other than a DA, you may be prompted to select this information.

3) Select **Basic** for the **User Mode**.

4) Click **Add**. The User Add page displays. If no license is available, an error displays.

5) Select the **User Profile** from the drop-down list. You can select User Profiles for Aastra and Polycom phones when the Polycom Phone Support system license for Clearspan is installed.

   Click the **View Template** button if you want to see the template that has been assigned to the phone. The template assignment was made in the User Profile that you selected.

6) Enter the **Last Name**, **First Name** and **E-mail Address** of the user to add.

7) Select the **Department** and **Phone Number**.

   Click the **View Phone Template** button if you want to see the template for the primary phone.

8) Enter the **Phone Location**. This can be the address, building, office, or any type of description the system administrator has set for this value.

   If the Emergency Gateway Manager is in use, then this field must contain the Emergency Response Location (ERL) that is defined in the Emergency Gateway. In this case, your System Administrator will assist in providing the ERL.

   If the Emergency Gateway Manager is not in use, enter the physical location of this user's phone device.

9) Enter the **Voice Portal Passcode**. It should be a numeric value, four to eight digits in length.

10) Enter the **User Password**. It must be at least six characters; the number of characters to enter is set by the administrator. You can click **Initialize User Password to random password** to protect the user from unauthorized access in cases where the password will not be used.

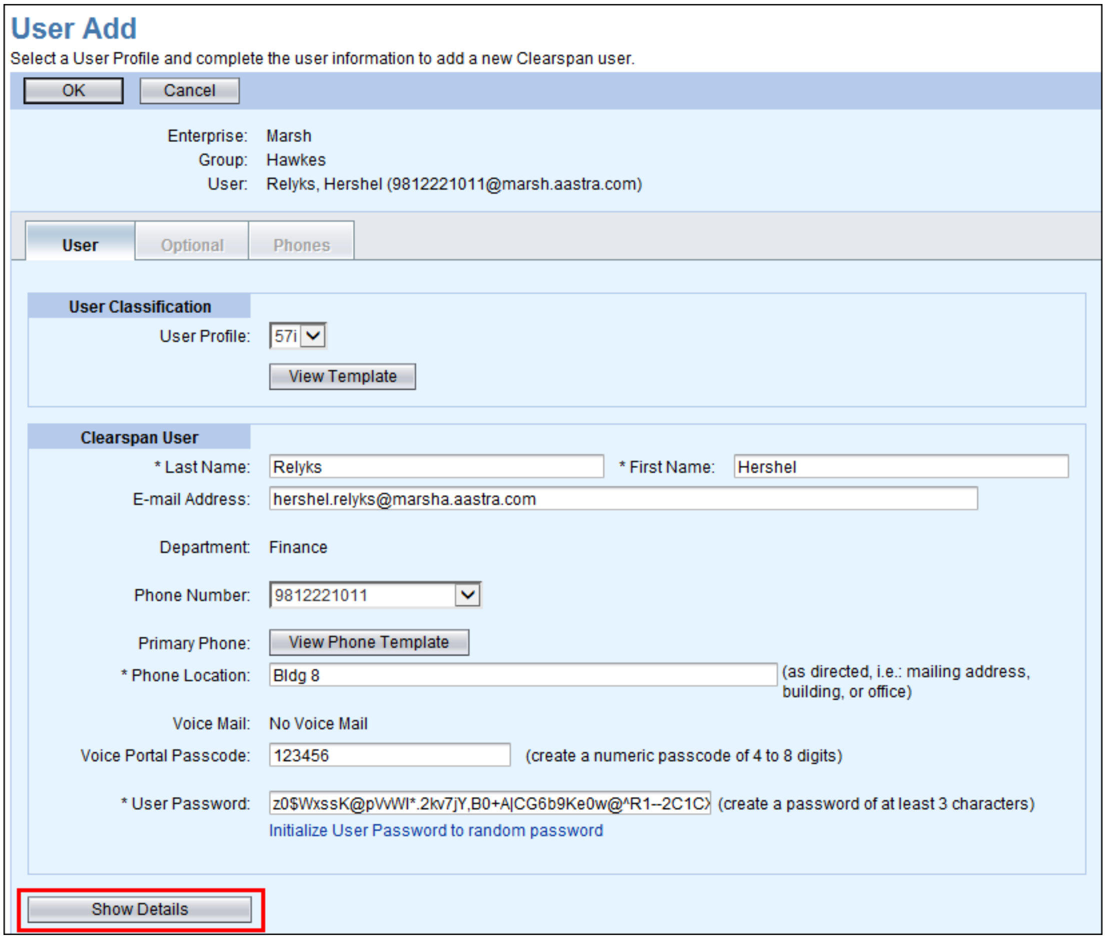


Figure 5 User Add Page – Populated with Show Details Button

11) Click **Show Details** at the bottom of the page if you want to see additional details of the User Add page. The hidden information is automatically generated as you enter user information on the top half of the page. There is no need to change any of this information.

There are four sections of additional information.

- **User Information**–The User ID and Extension.
- **Calling Party ID**–The Calling Party ID name and number.
- **Authentication**–User Name and automatically generated password.
- **Primary Phone Device**–The device name, line/port, and MAC address, and the Device Access Username and Password for Polycom devices. If the device is an Aastra phone, enter a temporary MAC Address, typically the user's extension. If the device is a Polycom phone, enter a true MAC Address or leave that field blank.

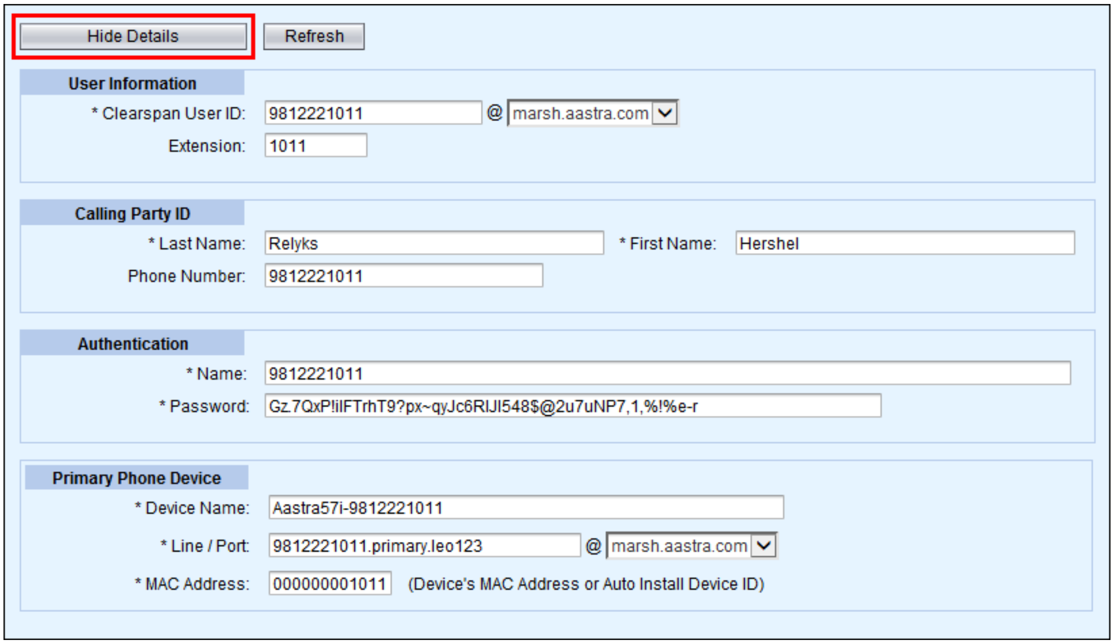


Figure 6 Show/Hide Details

12) Click **OK**.

You can click OK without viewing the other tabs, or you can go to the Optional tab and Phones tab. If you click OK, all input up to this point is validated and saved, the user is successfully added to Clearspan, and you are returned to the previous Users page where the new user appears in bold text in the user list.

3.1.1 Optional Tab

Click on the **Optional** tab of the User Add page to view or change optional values such as Contact Information, Time Zone, Language information, and Aliases used to place and receive calls.

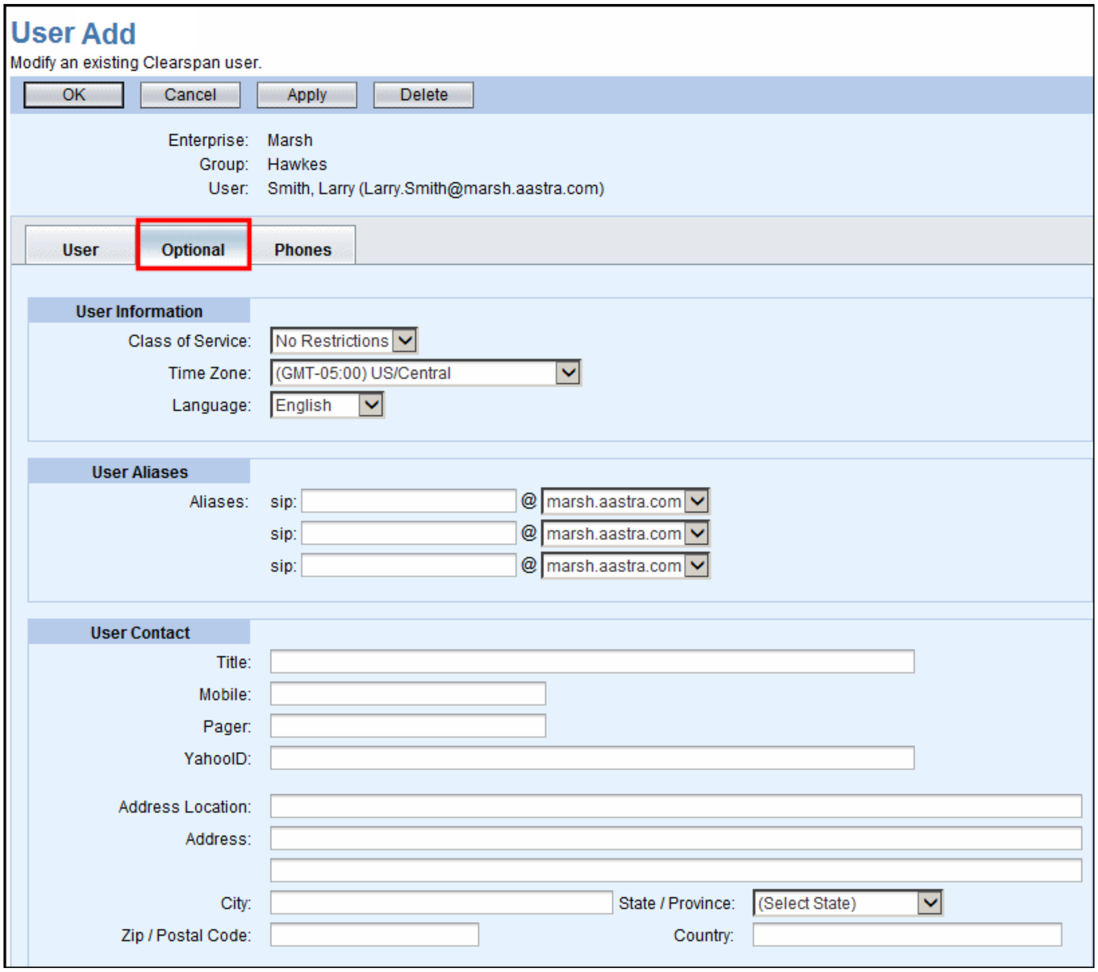


Figure 7 User Add Page – Optional Tab

3.1.2 Phones Tab

Click on the **Phones** tab of the User Add page to view or change the Phone Configuration and Shared Call Appearances, and view the primary phone device. (The **Restart Selected Phones** button is not available when creating a phone. It is only available when modifying a phone.)

- **View**–Takes you to the User: Primary Phone Device View.
- **View Template**–Takes you to the User: Phone Template page.
- **SCA Options** (Shared Call Appearance)–Takes you to the SCA Options tab.

Note

There are two View links in the Phone Devices table. The View button takes you to the User: Phone Template page, and the View link in the last column takes you to the User: Primary Phone Device View page.

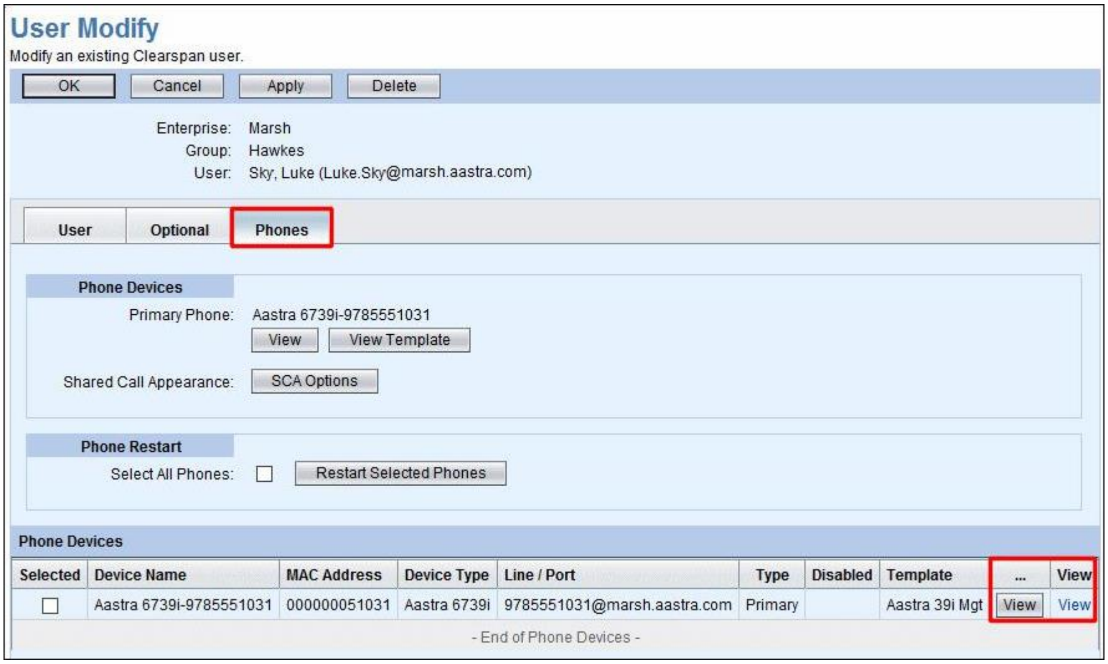


Figure 8 User Add – Phones Tab

3.1.3 User: Primary Phone Device View

The User: Primary Phone Device View page is read only and has five sections, as follows.

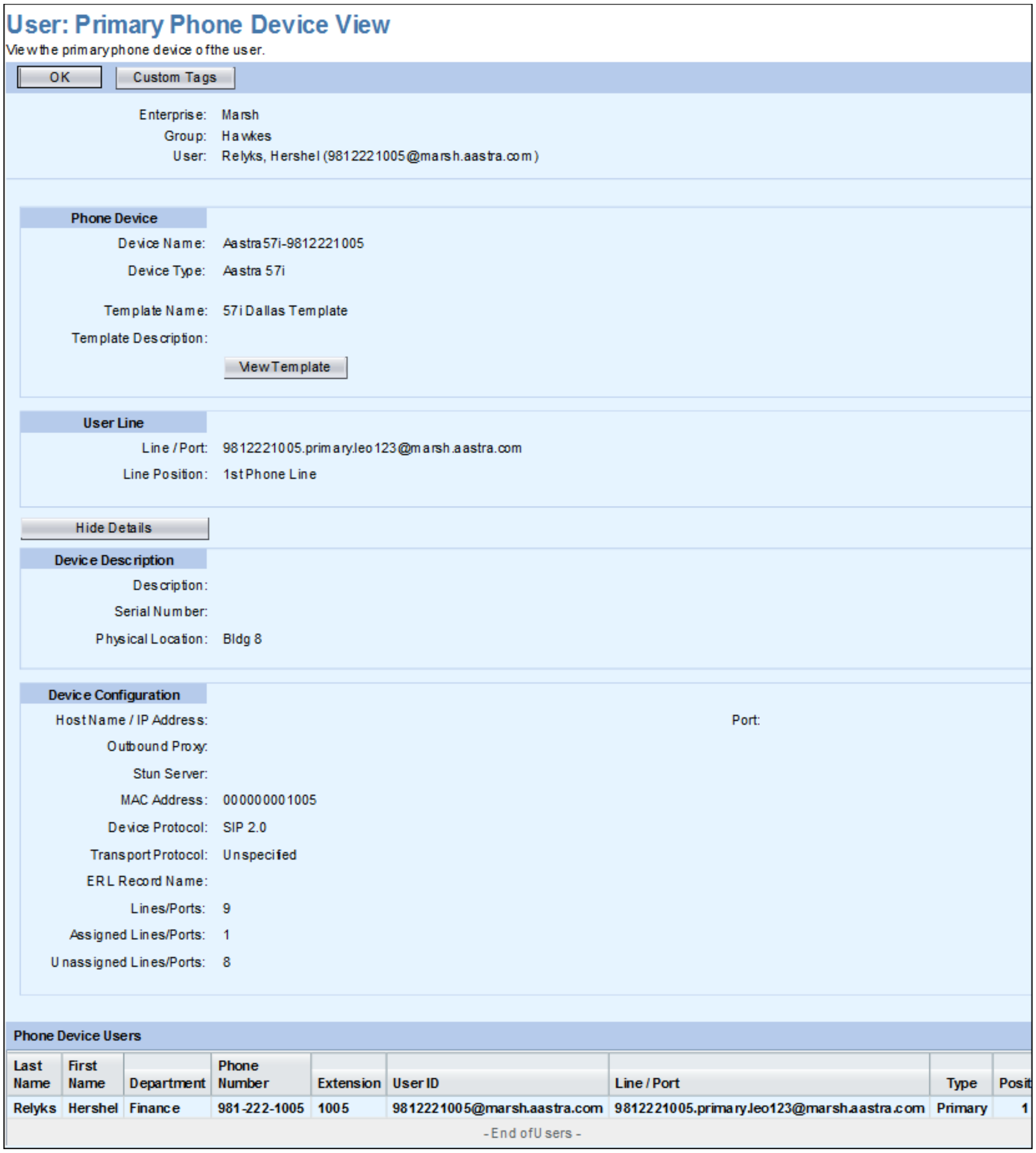


Figure 9 User: Primary Phone Device View

- **Phone Device**–Device Name and Device Type, the Template Name and Description.
- **User Line**–Displays the line/port and where the line appears on the phone.
- **Device Description**–Additional information about the device in Clearspan, including the Physical Location.
- **Device Configuration**–Additional information about the device in Clearspan, including MAC address and Device Access information, when applicable.
- **Phone Device Users Table**–This table contains information about the line and where it appears on the phone.

The **View Template** button takes you to the User: Phone Template page.

3.1.4 User: Phone Template Page

The User: Phone Template page is read only. This display is the phone device/template of this user's phone. The following information is displayed:

- The Enterprise and Group associated with the user.
- The Phone Device Type and the Template name. These values come from the User Profile which is created by the Advanced OpEasy Admin.
- Photo of the phone device, along with the soft key/hard key descriptions.
- Detail of the lines that appear as hard keys on the phone.

User: Phone Template

View the details of the phone template assigned to a phone device of the user.

OK

Enterprise: Marsh

Group: Hawkes

Phone Device Type: Aastra 55i

Template Name: Hawkes55i

Template Level: Group

Description: 55is in Hawkes group

Telephone Line	Phone Number	Ring
Line 4	2nd Phone Number	Default
Line 3	2nd Phone Number	Default
Line 2	1st Phone Number	Default
Line 1	1st Phone Number	Default

Programmable Keys	Function	Options
PK1	Callers	1st Phone Number
PK2	Outlook	1st Phone Number
PK3	LDAP Lookup	1st Phone Number

Programmable Keys	Function	Options
PK4		
PK5	RSS Feed	1st Phone Number
PK6		

Soft Keys	Function	Options
SK1		
SK2	Call Pickup	1st Phone Number
SK3	Voice Mail	1st Phone Number

Soft Keys	Function	Options
SK4	Call Park	1st Phone Number
SK5	Park Rtrv	1st Phone Number
SK6	More	

Figure 10 User: Phone Template Page

3.1.5 SCA Options Tab

Shared Call Appearances are created by advanced administrators. When you click on the **SCA Options** button, the SCA-related settings appear, but they are not modifiable.

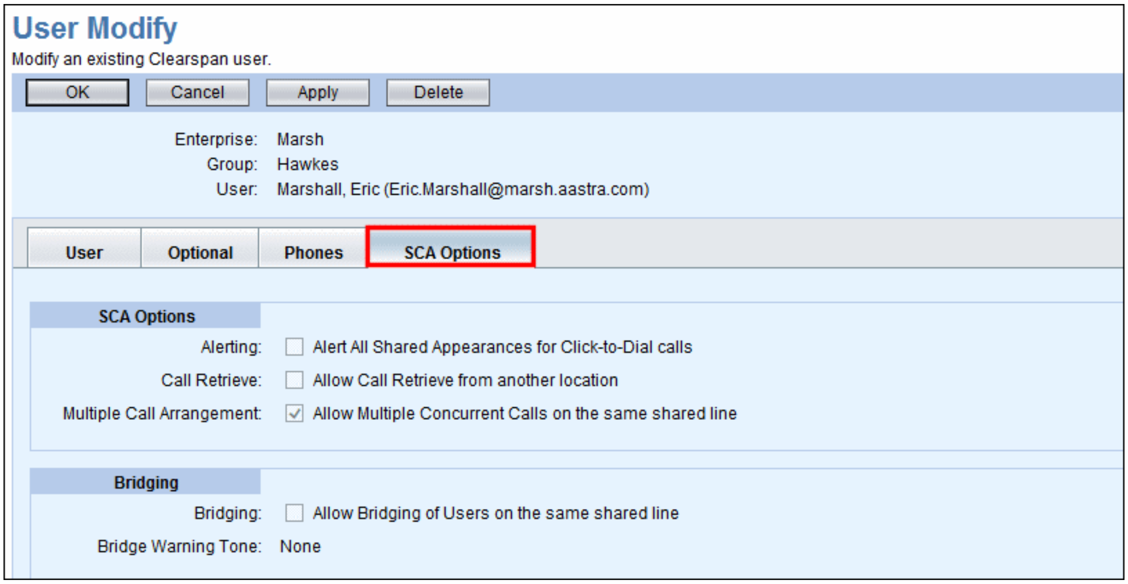


Figure 11 User Add – SCA Options Tab

3.2 New User E-mail Notification

After a new user is created, an optional e-mail goes out to the user containing instructions for setting up the new phone. The User Profile specifies whether or not the e-mail will be sent. A DA cannot change the content of this message but can view it.

1) From the main menu, select **Provisioning** and then **Users**.

2) Click **General Settings**. The User General Settings: New User E-mail Notification page displays.

3) Click **OK** to exit General Settings.

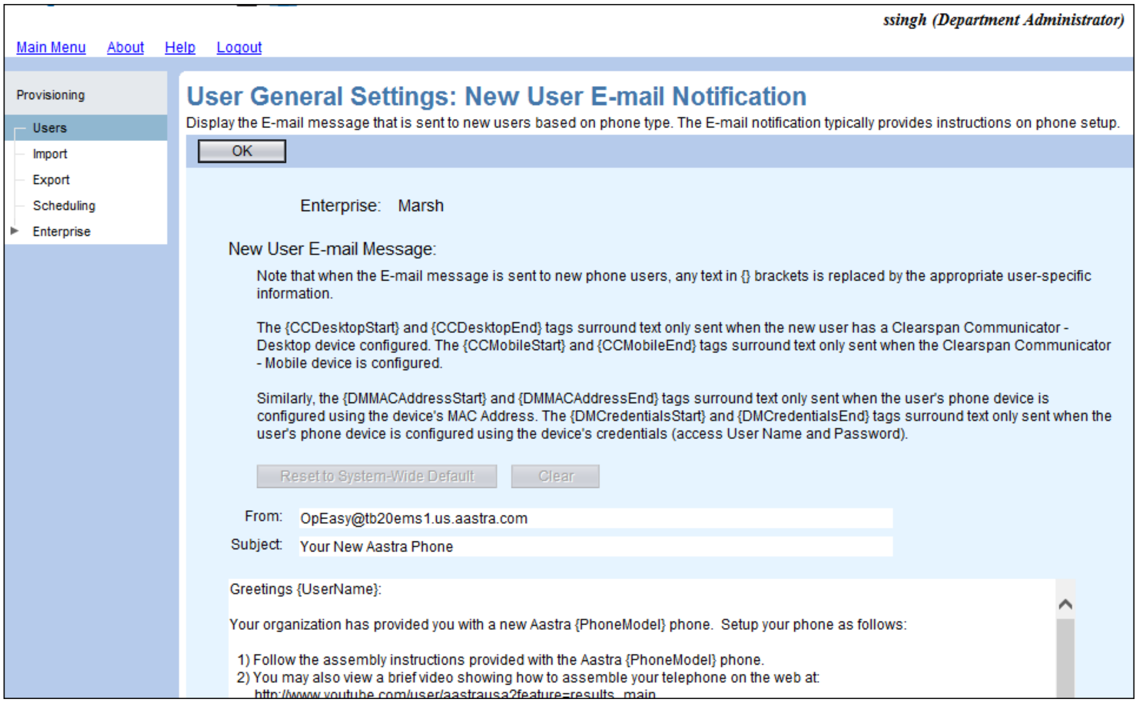


Figure 12 User General Settings: New User E-mail Notification

4 Modifying a Single User

The User Modify page displays when you access a user after it is created. The options are the same as in the User Add pages. You can modify those items that need to be changed.

1) From the main menu, select **Provisioning** and then **Users**.
2) Find the user to modify using the search fields. The default is to search for all users. However, you can narrow the search by adding search criteria as shown in the following illustration.

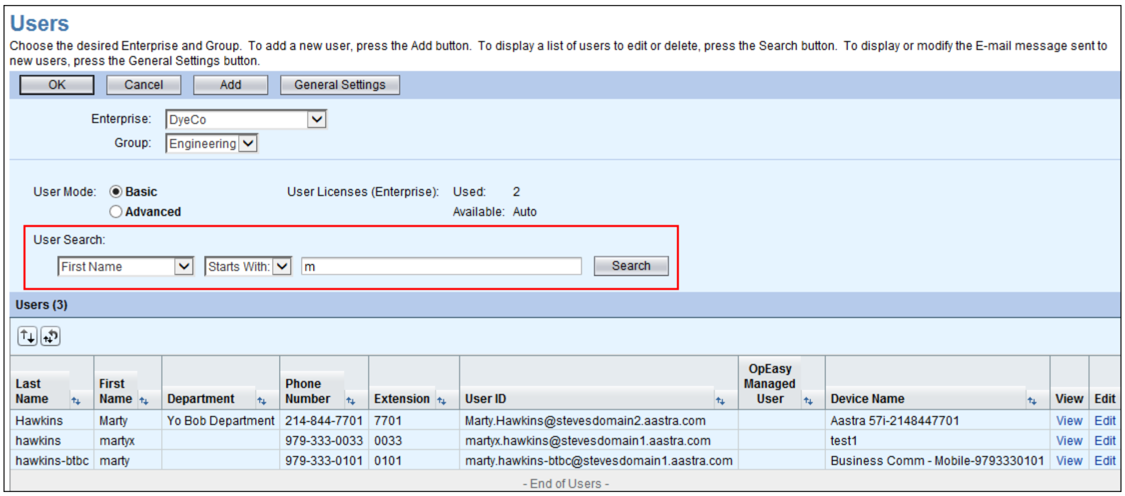


Figure 13 Search for User

3) Click on the **Edit** link at the far side of the user's row. The User Modify page displays. (The View link opens the Advanced: User View page, which displays user details that cannot change.)
4) Make any necessary changes to any part of the user's parameters. If no license is available when attempting to edit a user, an error displays and the user cannot be modified until additional licenses are allocated in the Enterprise.
5) Click **Apply**. The **Saved** indication displays over the OK button.
6) Click **OK**. The Users page displays.

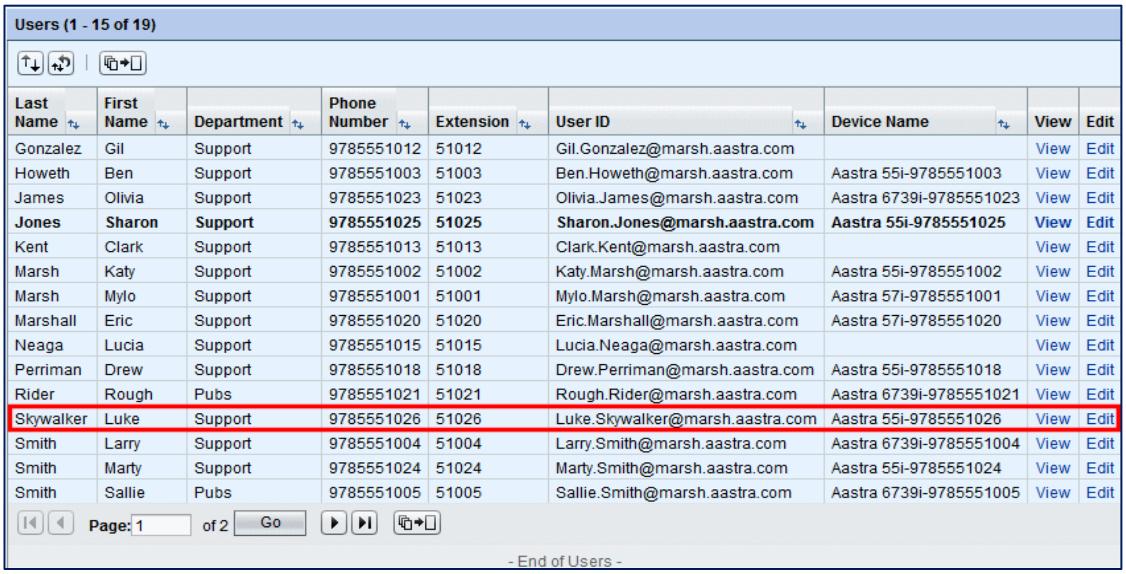
5 Deleting a Single User

You can delete a user after it has been created.

1) From the main menu, select **Provisioning** and then **Users**.

2) Click **Search** to obtain the list of users.

3) Click the **Edit** link on the far right of the row of the user you wish to delete.



Users (1 - 15 of 19)

Last Name	First Name	Department	Phone Number	Extension	User ID	Device Name	View	Edit
Gonzalez	Gil	Support	9785551012	51012	Gil.Gonzalez@marsh.aastra.com		View	Edit
Howeth	Ben	Support	9785551003	51003	Ben.Howeth@marsh.aastra.com	Aastra 55i-9785551003	View	Edit
James	Olivia	Support	9785551023	51023	Olivia.James@marsh.aastra.com	Aastra 6739i-9785551023	View	Edit
Jones	**Sharon**	**Support**	**9785551025**	**51025**	**Sharon.Jones@marsh.aastra.com**	**Aastra 55i-9785551025**	**View**	**Edit**
Kent	Clark	Support	9785551013	51013	Clark.Kent@marsh.aastra.com		View	Edit
Marsh	Katy	Support	9785551002	51002	Katy.Marsh@marsh.aastra.com	Aastra 55i-9785551002	View	Edit
Marsh	Mylo	Support	9785551001	51001	Mylo.Marsh@marsh.aastra.com	Aastra 57i-9785551001	View	Edit
Marshall	Eric	Support	9785551020	51020	Eric.Marshall@marsh.aastra.com	Aastra 57i-9785551020	View	Edit
Neaga	Lucia	Support	9785551015	51015	Lucia.Neaga@marsh.aastra.com		View	Edit
Perriman	Drew	Support	9785551018	51018	Drew.Perriman@marsh.aastra.com	Aastra 55i-9785551018	View	Edit
Rider	Rough	Pubs	9785551021	51021	Rough.Rider@marsh.aastra.com	Aastra 6739i-9785551021	View	Edit
Skywalker	Luke	Support	9785551026	51026	Luke.Skywalker@marsh.aastra.com	Aastra 55i-9785551026	View	Edit
Smith	Larry	Support	9785551004	51004	Larry.Smith@marsh.aastra.com	Aastra 6739i-9785551004	View	Edit
Smith	Marty	Support	9785551024	51024	Marty.Smith@marsh.aastra.com	Aastra 55i-9785551024	View	Edit
Smith	Sallie	Pubs	9785551005	51005	Sallie.Smith@marsh.aastra.com	Aastra 6739i-9785551005	View	Edit

Page: 1 of 2 Go

- End of Users -

Figure 14 Users Page – Edit Link

The User Modify page displays with a Delete button.

4) Click **Delete.**

5) Click **OK** in the confirmation dialog box. The Users page displays. The user and phone device are deleted. Deleting a user makes available any licenses that were allocated to the user.

6 Adding Multiple Users with Import

One or more Clearspan users can be added, deleted, or modified by importing Microsoft Excel worksheets into the Clearspan system. If you add a user in the worksheet, those fields are added to Clearspan. If you remove a user in the worksheet, all information regarding that user is deleted from Clearspan. Saved worksheets provide records for reference.

Users and features can be processed depending upon your assigned privileges. In the Basic worksheet, only users and their voice mail options are generated. This document addresses the Import Basic type. The Import Advanced option is presented in the *Clearspan OpEasy Advanced Provisioning User Guide*.

6.1 Opening a Worksheet

To add or remove users using import, you must first open and prepare an Excel worksheet to use.

1) In OpEasy, click **Import** from the menu tree or from the main Provisioning menu.
2) Select **Import: Basic** from the Import Type drop-down list on the Import page.
3) Click **Get Worksheet** to open a new spreadsheet, or click E-mail Worksheet to have a new spreadsheet sent in an E-mail message, as shown in the following example.

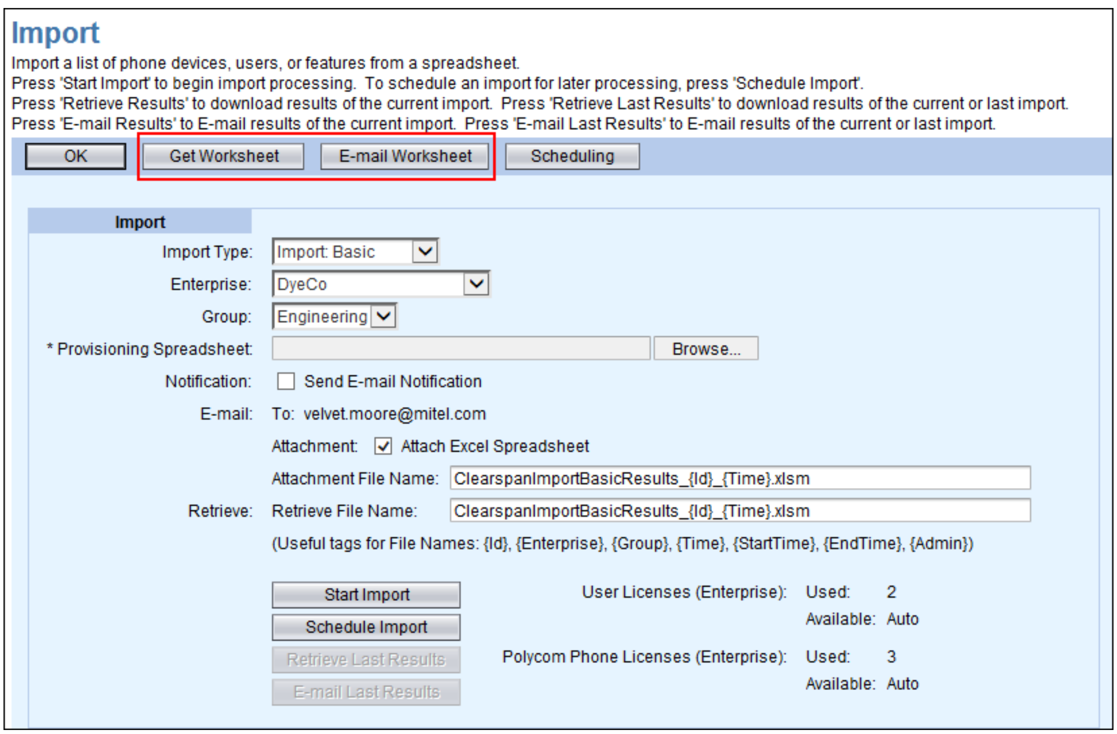
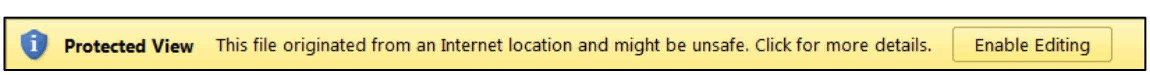
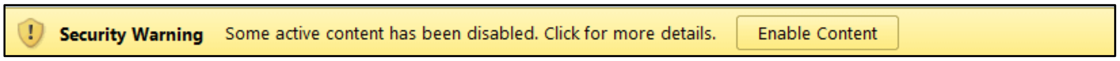


Figure 15 Get Worksheet Button

4) Click **Open**. The new worksheet opens. Do not try to edit the worksheet until you have cleared all of the Windows security warnings.
5) Click **Enable Editing**.



6) Click **Enable Content**.



The worksheet is now available for editing as shown in the following figure.

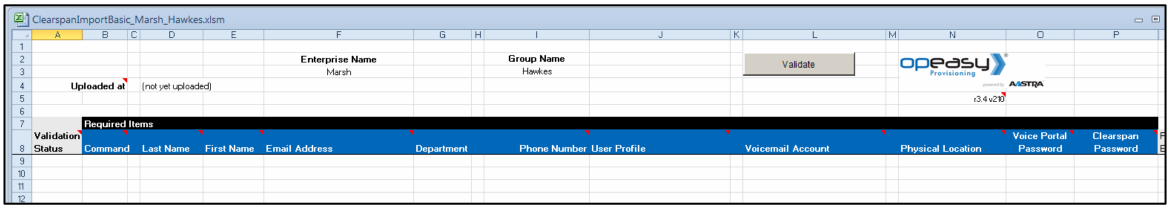


Figure 16 Clearspan Import Worksheet

The following is a description of the basic worksheet starting at the top.

- The Basic worksheet has two tabs:
  - Users–There are only 10 fields that must be entered on the worksheet. The commands are Add, Remove, and Done.
  - Voice Mail–The voice mail fields are generated automatically.

  The Advanced Import worksheet has 10 tabs. Within each tab are all possible commands that can be used and the definitions of those commands. The Advanced Import function is addressed in the 287704 CS Advanced Provisioning User Guide.
- The name of the new worksheet, which is shown centered at the top, is "ClearspanImportBasic_" followed by the Enterprise name and Group name. You should save this file to another name that is more meaningful to you. There are tags displayed that you can use if desired.
- In row 2 are the **Enterprise Name** and **Group Name** headers and below the headers are the actual enterprise and group associated with this worksheet.
- To the right of the Enterprise and Group name headers is the **Validate** button. It is used to perform validation of data that is entered in the worksheet.
- In row 4, the "**Uploaded at**" field will always be followed by "**(not yet loaded)"** when looking at a Clearspan Import worksheet that has not been processed (or "run"). However, once a worksheet is run, a Results worksheet is generated, and on the Results worksheet the "(not yet loaded)" will be replaced with the date and time the worksheet was processed.
- The value in row 5, column N is the **version** number (e.g. v**217**) of the worksheet.
- Rows 7 and 8 identify the required information that will be needed to create Clearspan users.

6.2 Adding Users in the Worksheet

After you have retrieved and opened an Excel worksheet to use, fill it in with the changes you want to import.

1) Click on a cell in column B and select **Add** from the Command drop-down list. You can only **Add** or **Remove** users in the Basic worksheet. The **Done** command ends the processing at the row where it appears.
2) Enter the **Last Name** and the **First Name**. Most characters are acceptable but the first character cannot be a '+'. The combination of first and last name must be at least 5 characters.
3) Enter the **E-mail Address**. The address must contain the '@' symbol.

4) Click in the Department column and select the **Department**, if necessary, from the drop-down list.

5) Enter an available **Phone Number**. The System Administrator must provide the phone number range.

6) Click in the User Profile column and select the **User Profile** from the drop-down list.

7) Select the **Voicemail Account** type from the drop-down list. If no voice mail is associated with this user, the column does not have a drop-down list.

8) Enter the **Physical Location**. This information is provided by the system administrator. If the Emergency Gateway Manager is in use, then this field must contain the Emergency Response Location (ERL) that is defined in the Emergency Gateway. In this case, the System Administrator will assist in providing the ERL. If the Emergency Gateway Manager is not in use, enter the physical location of this user's phone device (i.e. the address, building, office, or whatever rule the system administrator has set for this value.).

9) Enter the **Voice Portal Password**. If your user will be given the ability to retrieve voice mail messages from his or her phone, a voice portal password is required. The value must be numeric and the system administrator typically sets the length between four and eight digits. This password is entered from the phone to allow entry to the voice mail portal. This portal is used for more than just voice mail access; for this reason, the worksheet allows entry of a password even if voice mail is not enabled.

10) Enter the **Clearspan Password**. The value can be alphanumeric and the minimum is usually six characters. This password is used to allow Clearspan user access to the Clearspan web portal, if authorized.

11) Repeat Steps 1-10 to enter other users, and then go to Step 12.

12) Select **Done** from the Command column drop-down list on the last row when you have entered all of the users for this worksheet.

13) Click the **Validate** button to validate the user data entered. If the validation is successful, two things will happen.

    - The **Validation Status** column, Column A on the far left of the row, will show **Ok** for each row where a command (other than Done) was issued.
    - Below the Validate button, the text "**Pass, valid**" along with the date and time of validation appears.

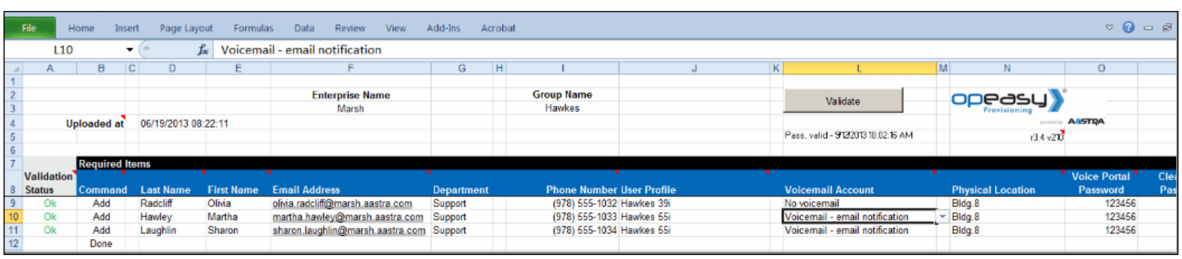


Figure 17 Worksheet Validated

14) Save the Worksheet locally to another descriptive name because you will be using this worksheet later. For example, you might want to save it as "**ClearspanImportBasic_Marsh_Hawkes_Add_3_Users_20140410.xlsm**".

6.3 Correcting Validation Failures

If validation fails, three things happen:

- The text “Failed, invalid” followed by the date and time of validation will appear under the Validate button.
- A character with a blue background will appear in the Validation Status cell(s).
- The cell(s) with invalid data will be highlighted.

Example 1:

In this example, I9 and I10 are marked for errors. The failure is duplicate phone numbers. You can correct the error and Validate again.

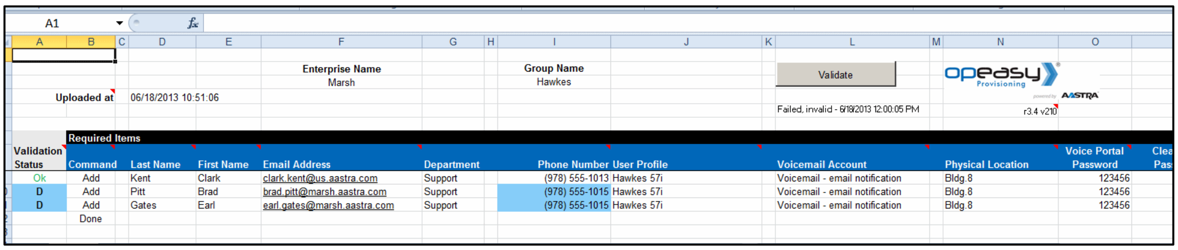


Figure 18 Validation Failure 1

Example 2:

In this example, J10 is flagged because there is no data for the User Profile column entered. You can correct the error and Validate again.

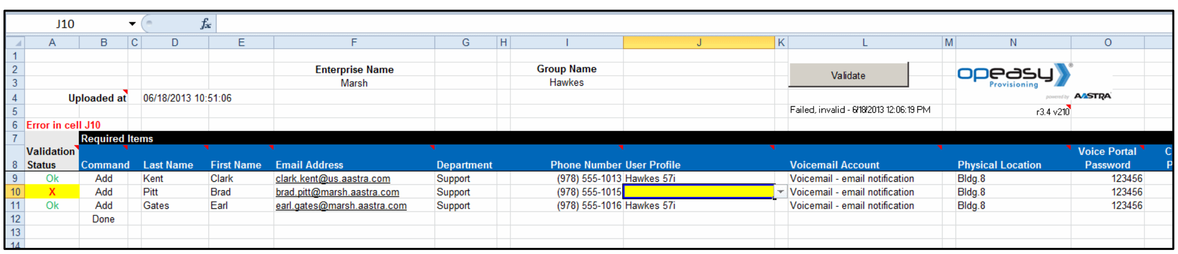


Figure 19 Validation Failure 2

6.4 Importing the Worksheet

The Import page allows you to set up Worksheet processing and view results.

1) In OpEasy, select **Provisioning** and then **Import**.

2) Select **Import Basic** from the **Import Type** drop-down list.

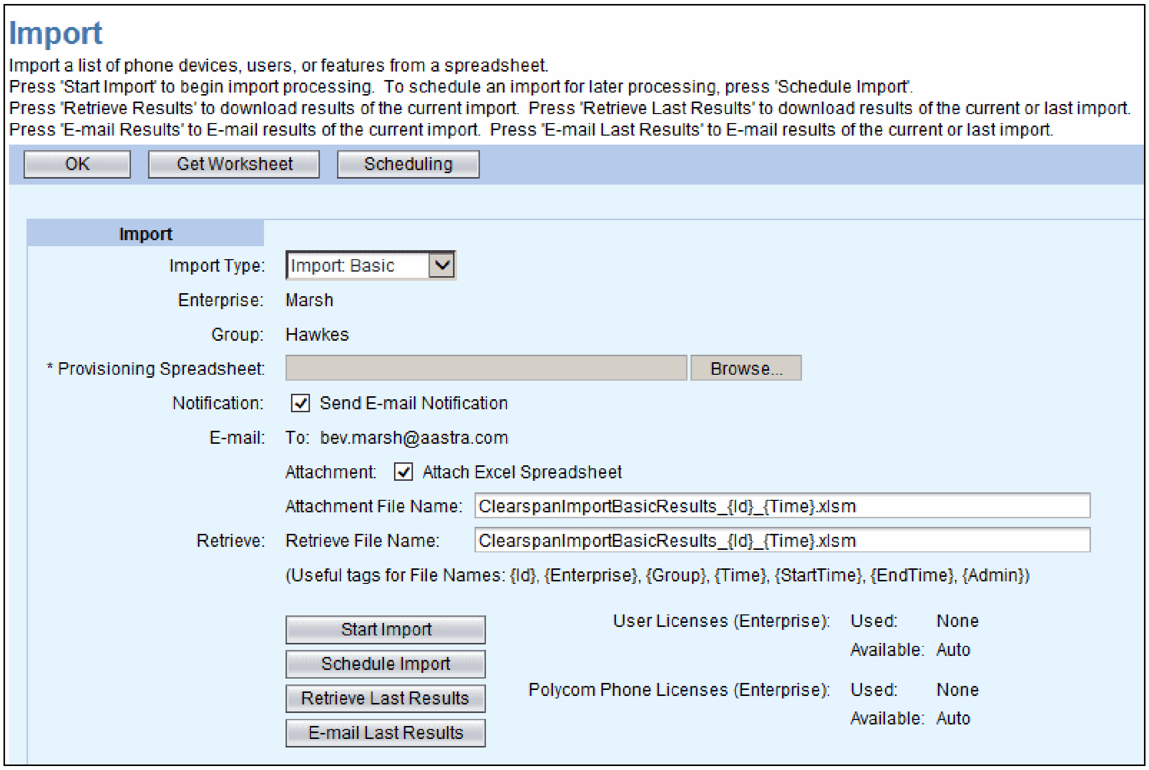


Figure 20 Import Page - Top Half

3) Select the **Enterprise/Group**, if necessary. These do not display until you select an Import type. Entering this information is dependent upon your selection:

- Enterprise–Entered when you select **Import Advanced**.
- Enterprise and Group–Entered when you select **Import Basic**.

4) Enter the filename of the Provisioning Spreadsheet that you wish to run, or use **Browse** to locate it.

5) Check the **Notification** check box to have an E-Mail notification sent to you with processing results.

6) Check the **Attach Excel Spreadsheet** box if you wish to receive the results spreadsheet.

7) Enter the **Attachment File Name** in the text box or keep the default. The system will rename the results file for you. You can also use the suggested tags in the filename.

8) Enter the **Retrieve File Name** or keep the default. The system will rename the results file for you. You can also use the suggested tags in the filename.

9) Click **Start Import**. Worksheet processing starts and the **Progress Messages** box is updated to reflect the text "**Import waiting to start…**".

Note

A User License is required for each added user, and a Polycom Phone License is required for each added Polycom phone. The import aborts on a line where a license could not be obtained. You can restart the import after adding the appropriate number and type of licenses to the Enterprise.

10) Click **Refresh** while processing is active to get status updates. The “Import Basic completed successfully” message displays when processing is complete.

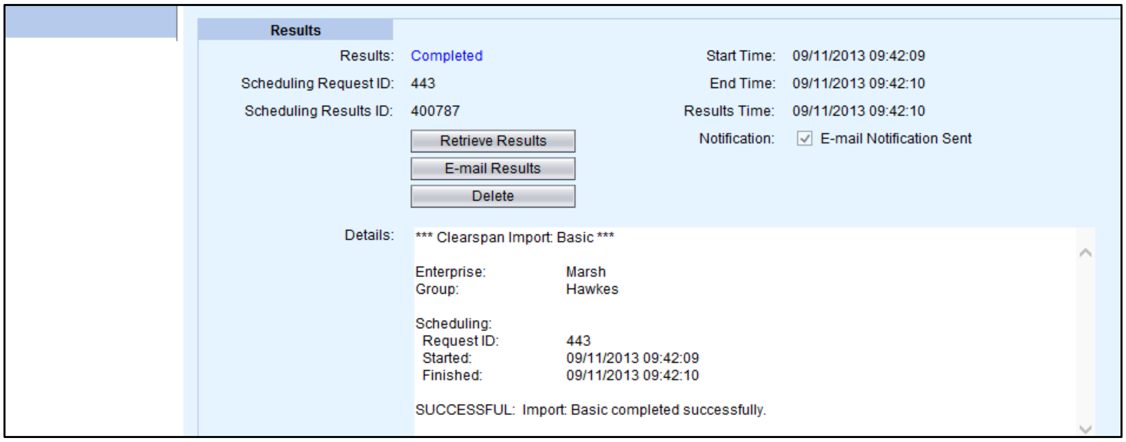


Figure 21 Import Page – Progress Messages and Results

6.5 Viewing Import Results

After the import has processed, the “*SUCCESSFUL: Import Basic completed successfully*” text displays at the bottom of the Import page.

1) On the Import page, click **Retrieve Results** after processing a spreadsheet.

2) Click **Open**. An Excel spreadsheet with the filename similar to “ClearspanImportBasicResults_443_20130911-094209.xlsm” opens, where 443 is the schedule ID, 20130911 is the date, and 094209 is the time.

6.5.1 Users Tab

- The **Status** column shows **Success**. This is an indication that each command was successfully performed.
- The **Processing Error** column for each user shows no errors.

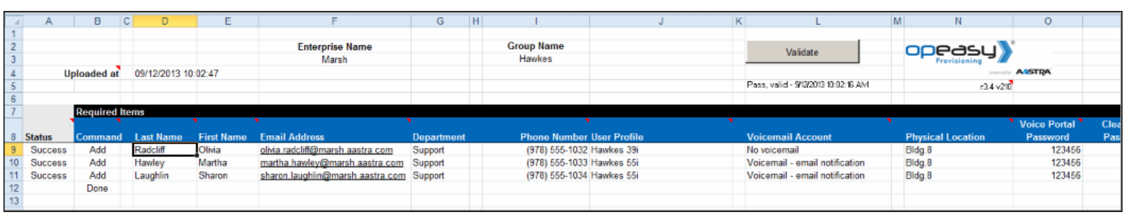


Figure 22 Results Worksheet

3) Save the **Results** worksheet to a new filename, if desired, as a record of the changes that have been performed.

6.5.2 Voicemail Tab

The Voicemail tab appears when at least one user is created that specifies a VMail account type. As shown in Figure 23, the Status column shows **Success** in the first column of the Voicemail Tab. The voicemail information has been updated successfully.

	A	B	C	D	E	F	G	H	I	J	K	
1		**Uploaded at**		09/12/2013 10:02:47								
2												
3												
4	**Status**	**Command**		**ClearspanUserId**	**VoicemailServer**	**Active**	**RedirectAllToVoicemail**	**RedirectBusyToVoicemail**	**RedirectNoAnsToVoicemail**	**RedirectOutOfZoneToVoicemail**	**MessageProcessing**	**Deliv**
5	Succes	Add		Martha.Hawley@marsh.aastra.com	Clearspan	Yes	No	Yes	Yes	No	Unified Voice and Email	martha.haw
6	Succes	Add		Sharon.Laughlin@marsh.aastra.com	Clearspan	Yes	No	Yes	Yes	No	Unified Voice and Email	sharon.laug
7		Done										
8												
9												

Figure 23 Voice Mail Tab

6.5.3 Error Examples on the Results Worksheet

The following example shows you what happens when an error is introduced in the worksheet. This example adds a user that has the wrong phone number.

The following example shows the error found during processing.

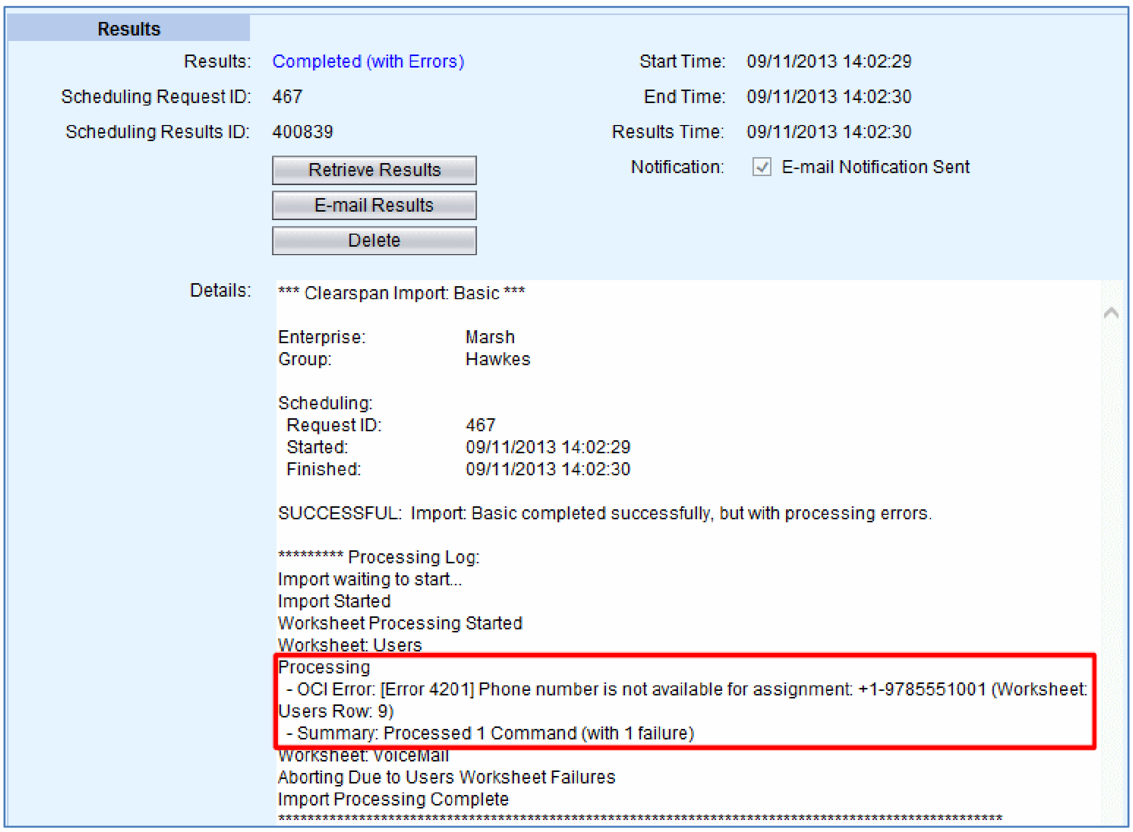


Figure 24 Progress Messages Error

On the Results worksheet in Figure 25 , the first column indicates “Failure”. Scroll to the right of the worksheet to view the Processing Error column content. The Error column indicates “OCI Error: [Error 4201] Phone number is not available for assignment: +1-9785551001.” This error means that the phone number is used by someone else or is not assigned to this group. The solution is to enter a valid phone number for the user.

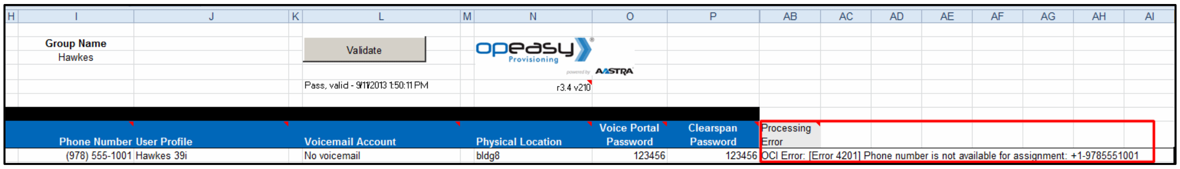


Figure 25 Validation Status Column - Failure

6.5.4 Results

Results can be retrieved immediately or sent by E-mail. The E-mail parameters on the Import page determine how the E-mail will be handled. Click **Email Last Results** or **Email Results** to send the results of the current worksheet that was processed. To retrieve the results immediately, click **Retrieve Last Report** or **Retrieve Report** on the OpEasy Import page. The import results spreadsheet opens.

The Provisioning application does not validate the E-mail address. Even if the E-mail address is not valid, the message in blue will still display because the attempt to send the E-mail was made.

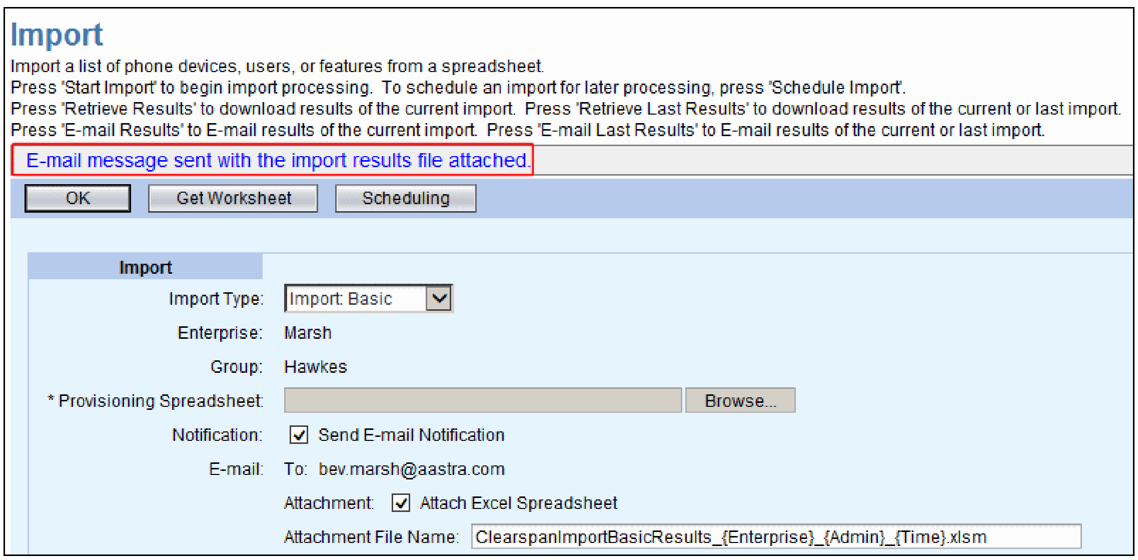


Figure 26 E-mail Message Sent Message

7 Removing Multiple Users with Import

If you have used a worksheet in the past to add multiple users, you can use that same worksheet and change the operation to “Remove” to perform the delete on those users.

When using Basic Import, you must start with the worksheet that was used to add the user(s) originally. If you do not have the original worksheet, then you must use Advanced Import, which allows specification of User ID.

1) Open the worksheet that was used to originally add the user(s) that you want to remove.
2) Select **Remove** from the Command drop-down list in column B. Do this for each user that you wish to delete.
3) Select **Done** from the drop-down list when you are finished.
4) Clear the values in the **Status** column. See the following example.

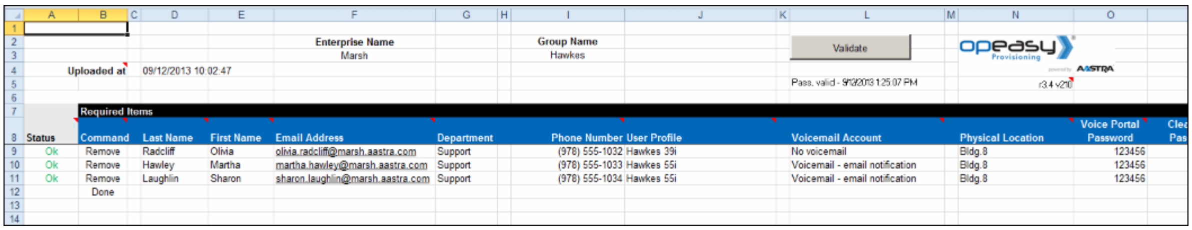


Figure 27 Worksheet – Validation

5) Click **Validate**. Validation will remove the data in the Voice Mail tab automatically and will provide a new status in the **Status** column.

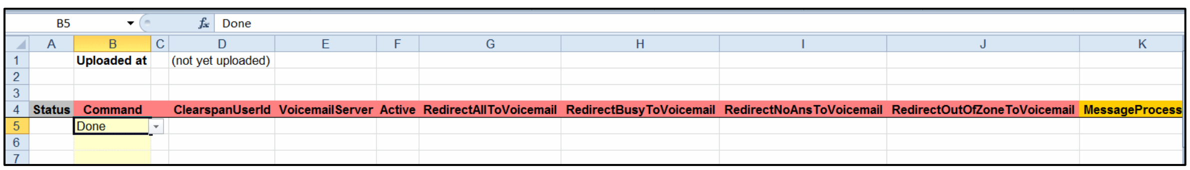


Figure 28 Voice Mail Tab on Remove Worksheet

6) Save the spreadsheet with a new name.
7) In OpEasy, select Provisioning from the main menu, and then select **Import**.
8) Click **Browse** on the Import page to locate the Provisioning Spreadsheet that you just saved.
9) Click **Open**. The Provisioning spreadsheet box is populated.
10) Click **Start Import**. The Status message box opens with the “Waiting to start…” message.

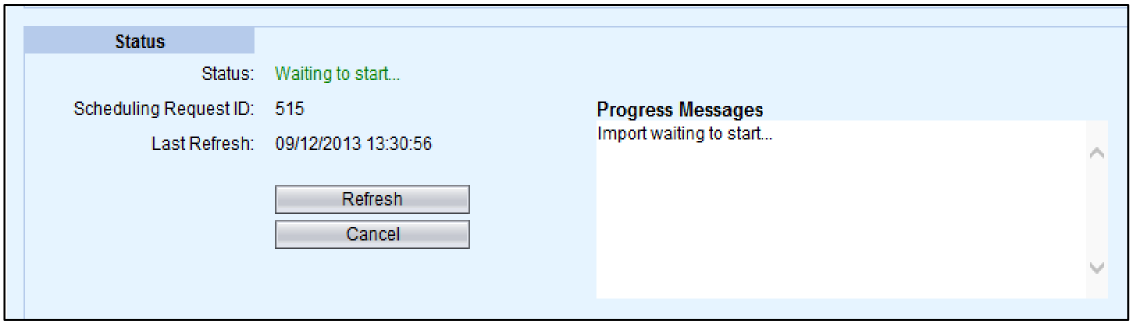


Figure 29 Remove User Worksheet Process Starting

11) Click **Refresh** to view the progress messages. The "Import Basic completed successfully" message displays when processing is complete. The users are deleted.

8 Scheduling an Import

You can schedule an Import on the Import page after you have selected a worksheet to process. The Scheduling page displays imports that have already been scheduled to run now or on a pre-defined schedule.

1) From the OpEasy main menu, select **Provisioning**, and then select **Import**.
2) Select **Import: Basic** as the Import Type.
3) **Browse** for the worksheet that you wish to schedule for import.
4) Make changes to the file names, if desired.
5) Click **Schedule Import**. The Scheduling Request: Import: Basic page opens as shown in Figure 30.

Note

Do not use the **Start Import** button until you have provided the Schedule information.

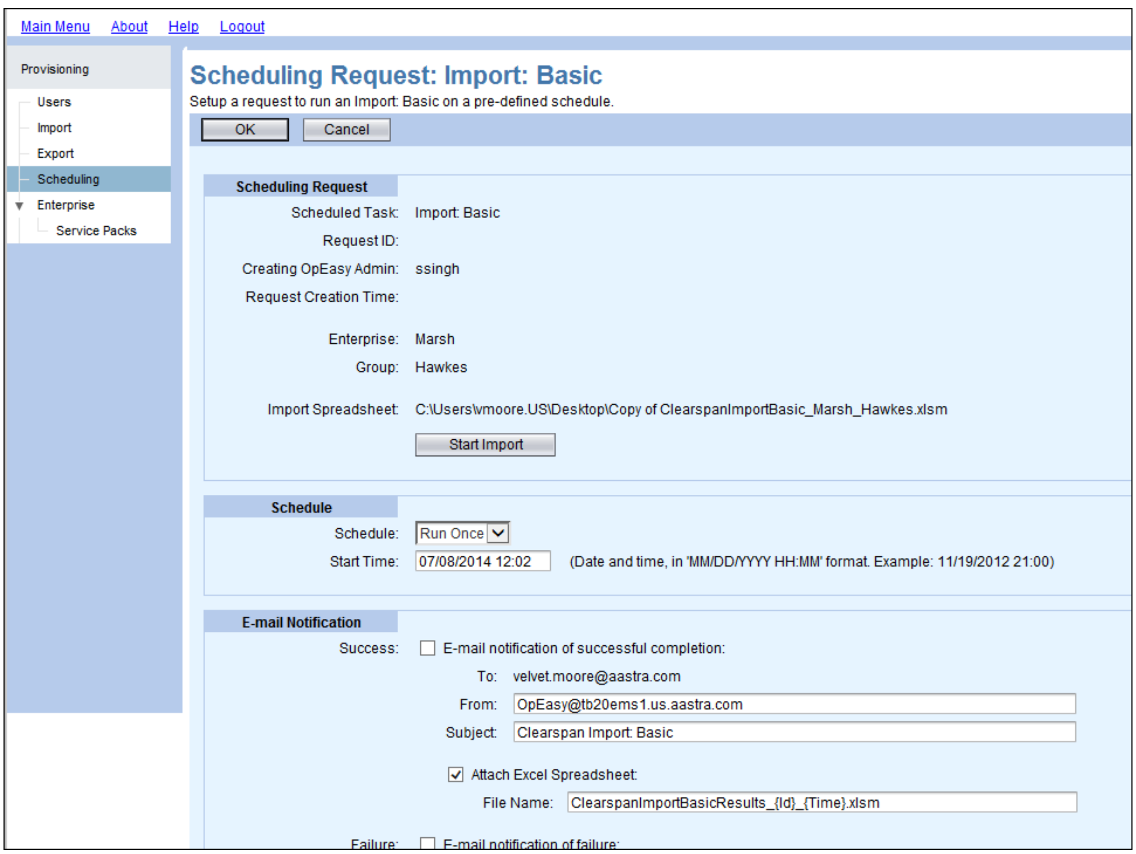


Figure 30 Scheduling Request: Import: Basic Page – Top Half

6) Select the **Schedule** type from the Schedule drop-down menu.

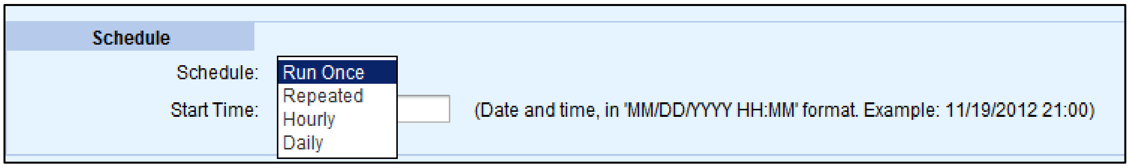


Figure 31 Selecting the Schedule Type

If you selected **Run Once**:

- Enter the **Start** Time: The date, a space, and the time (hour and minute). The Import runs only one time.

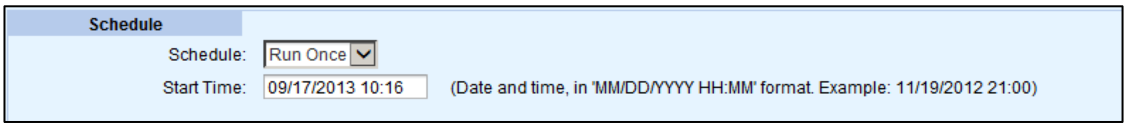


Figure 32 Schedule Run Once

If you selected **Repeated**:

- Enter the **Initial Start Time:** The date, a space, and the time (hour and minute).
- Enter the **Repeat Run**: The Import runs every (number of minutes).
- Enter the **Maximum Number of Runs**. Leave the box blank or enter 0 if there is no limit.

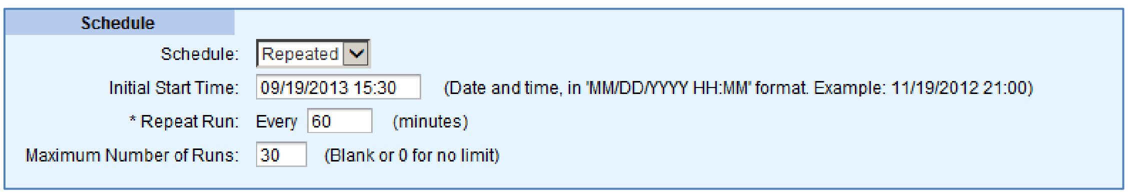


Figure 33 Schedule Repeated

If you selected **Hourly**:

- Enter the **Start After** time: The date, a space, and the time (hour and minute).
- Enter an **Hourly Schedule**: A list of minutes within the hour. Example: 00:15, 00:45. The import runs at 15 minutes, and another at 45 minutes.
- Enter the **Maximum Number of Runs**. Leave the box blank or enter 0 if there is no limit.

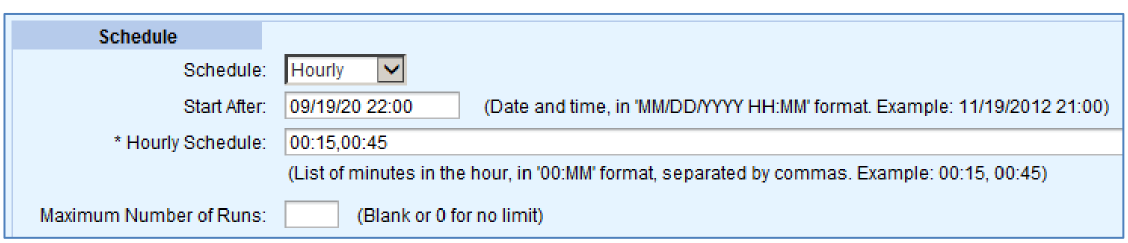


Figure 34 Schedule Hourly

If you selected **Daily**:

- Enter the **Start After** time: The date, a space, and the time (hour and minute).
- Enter the **Daily Schedule**: A list of times within the day using the 24-hour clock. See the following example.
- Enter the **Maximum Number of Runs**. Leave the box blank or enter 0 if there is no limit.

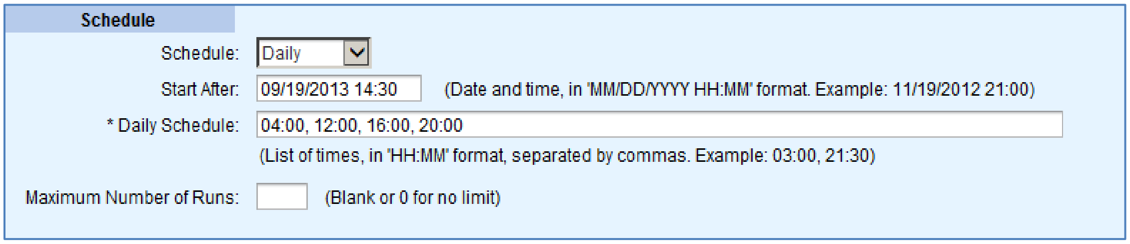


Figure 35 Schedule Daily

7) Set up E-mail notification parameters. E-mails are sent to the E-mail address associated with your OpEasy Admin login. For worksheet imports that are successful and not successful, select whether to send an E-mail notification, specify the **From** address and **Subject**, and select whether to attach a spreadsheet. See Figure 36 for an example.

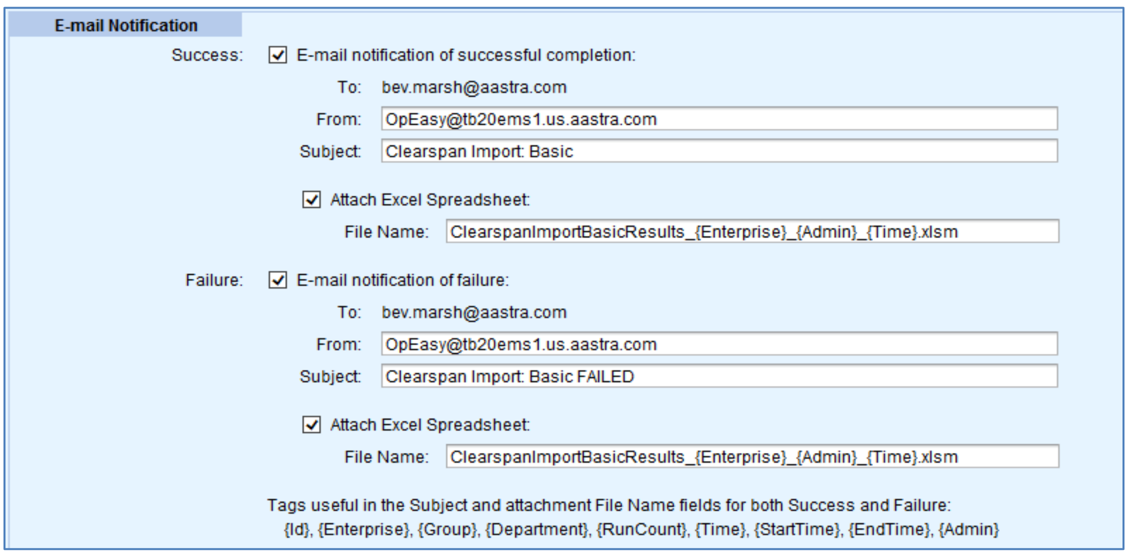


Figure 36 E-mail Notification Section - Setup

8) Click the **Start Import** button. The import will complete on schedule.

After you click **Start Import**, the screen refreshes and includes a **Status** section containing the current status of the Import as in Figure 37.

- Click **Stop** to stop the schedule.
- Click **Delete** to delete the schedule.
- Click **OK** to exit the page.

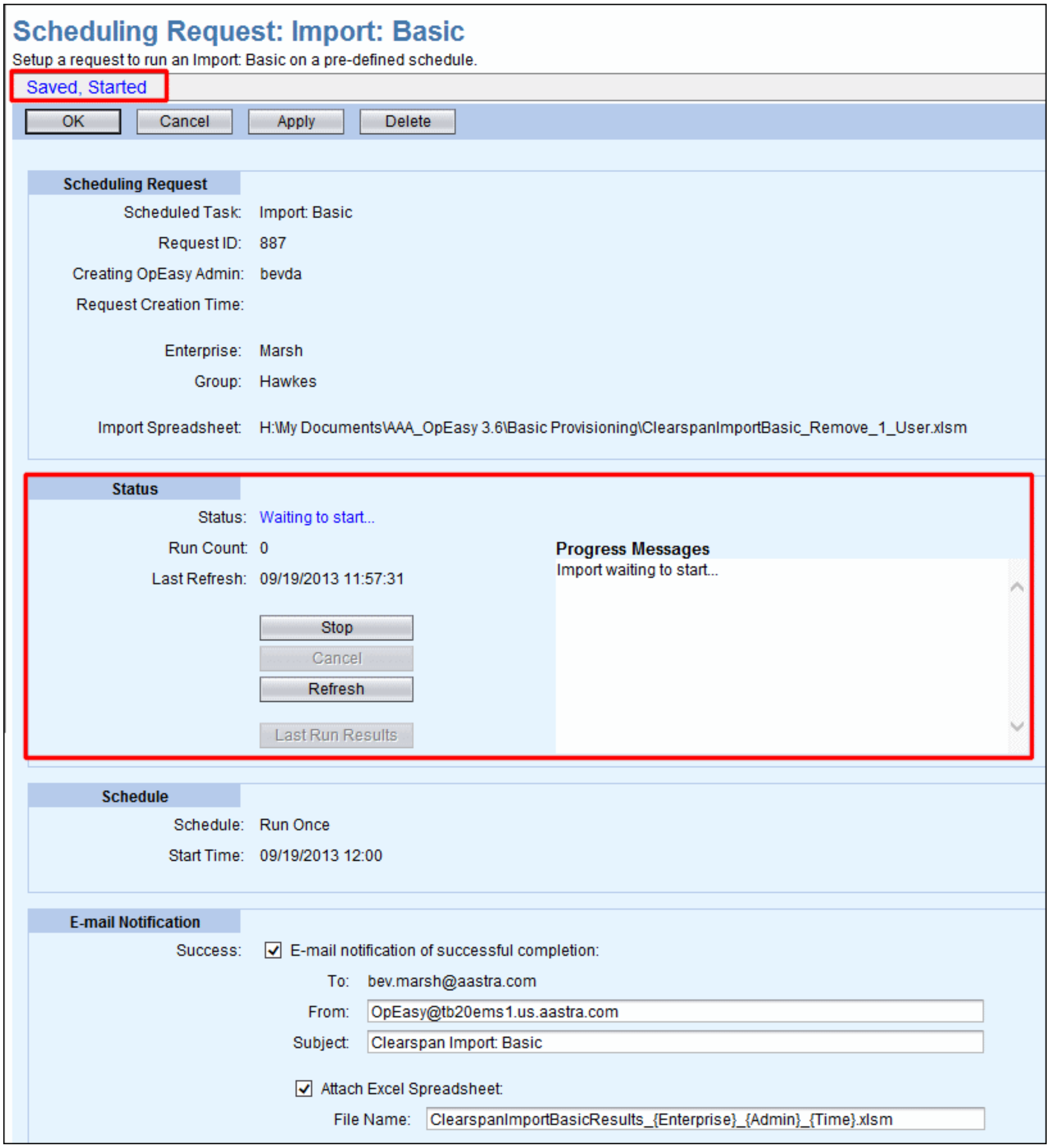


Figure 37 Status Section

8.1 Viewing Scheduled Imports

The Scheduling page displays imports and exports that have been scheduled to run now or on a pre-defined schedule. You can also delete a schedule on this page.

1) Click on **Provisioning** and then **Scheduling** in the menu tree, or click on the **Scheduling** button on the Import page. The Scheduling page displays with the current imports scheduled, finished, waiting to run, etc.

2) Select the **Scheduled Task** from the drop-down list. This filters the list of schedules.

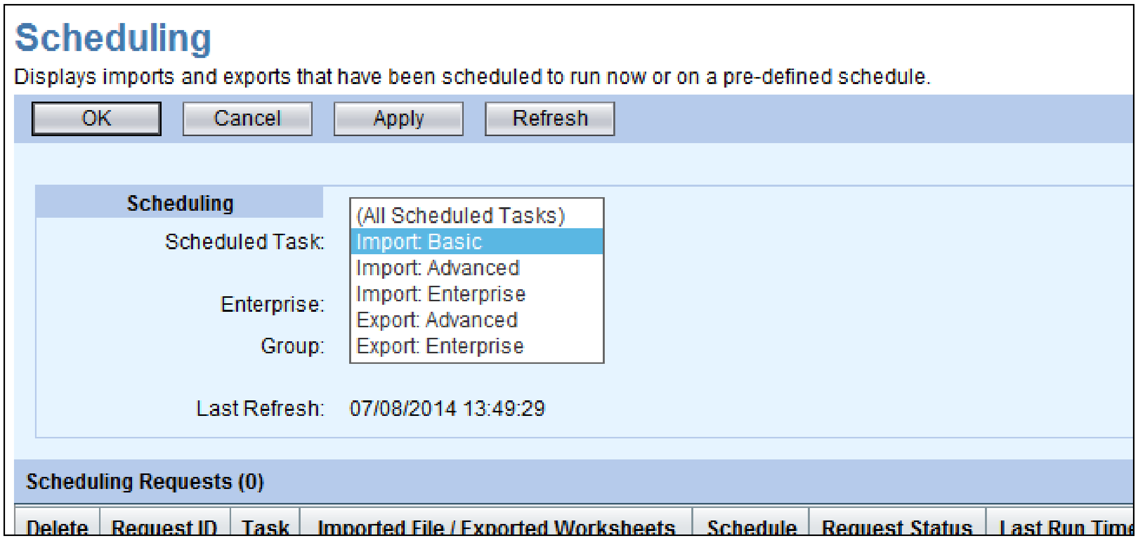
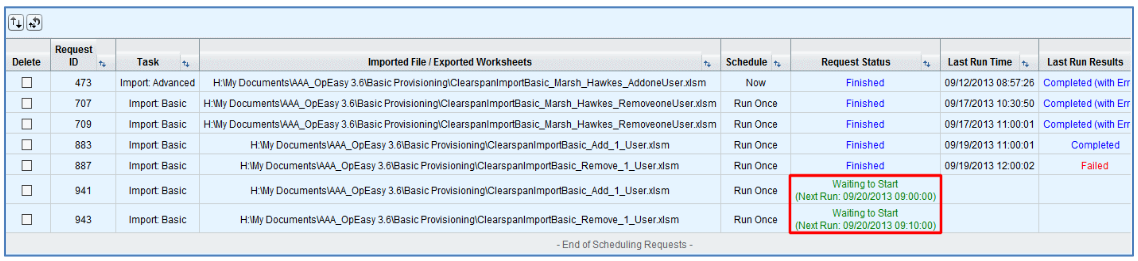


Figure 38 Scheduling Page

The following example illustrates a scheduled worksheet that is waiting to start.

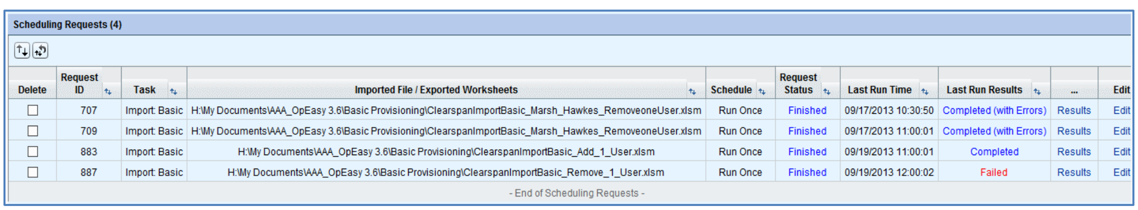


Delete	Request ID	Task	Imported File / Exported Worksheets	Schedule	Request Status	Last Run Time	Last Run Results
☐	473	Import: Advanced	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Marsh_Hawkes_AddoneUser.xlsm	Now	Finished	09/12/2013 08:57:26	Completed (with Err
☐	707	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Marsh_Hawkes_RemoveoneUser.xlsm	Run Once	Finished	09/17/2013 10:30:50	Completed (with Err
☐	709	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Marsh_Hawkes_RemoveoneUser.xlsm	Run Once	Finished	09/17/2013 11:00:01	Completed (with Err
☐	883	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Add_1_User.xlsm	Run Once	Finished	09/19/2013 11:00:01	Completed
☐	887	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Remove_1_User.xlsm	Run Once	Finished	09/19/2013 12:00:02	Failed
☐	941	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Add_1_User.xlsm	Run Once	Waiting to Start (Next Run: 09/20/2013 09:00:00)		
☐	943	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Remove_1_User.xlsm	Run Once	Waiting to Start (Next Run: 09/20/2013 09:10:00)		

- End of Scheduling Requests -

Figure 39 Worksheet Waiting to start a Run

The following example illustrates a worksheet that failed when it was processed.



Scheduling Requests (4)

Delete	Request ID	Task	Imported File / Exported Worksheets	Schedule	Request Status	Last Run Time	Last Run Results	...	Edit
☐	707	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Marsh_Hawkes_RemoveoneUser.xlsm	Run Once	Finished	09/17/2013 10:30:50	Completed (with Errors)	Results	Edit
☐	709	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Marsh_Hawkes_RemoveoneUser.xlsm	Run Once	Finished	09/17/2013 11:00:01	Completed (with Errors)	Results	Edit
☐	883	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Add_1_User.xlsm	Run Once	Finished	09/19/2013 11:00:01	Completed	Results	Edit
☐	887	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Remove_1_User.xlsm	Run Once	Finished	09/19/2013 12:00:02	Failed	Results	Edit

- End of Scheduling Requests -

Figure 40 Worksheet Run Failed

3) Click **Refresh** to bring the screen up to date.

4) Click on the **Results** link in the row of the schedule for which you would like to see the results. The Schedule Results: Import: Basic page displays as in Figure 41.

5) Click **OK** to return to the Scheduling page.

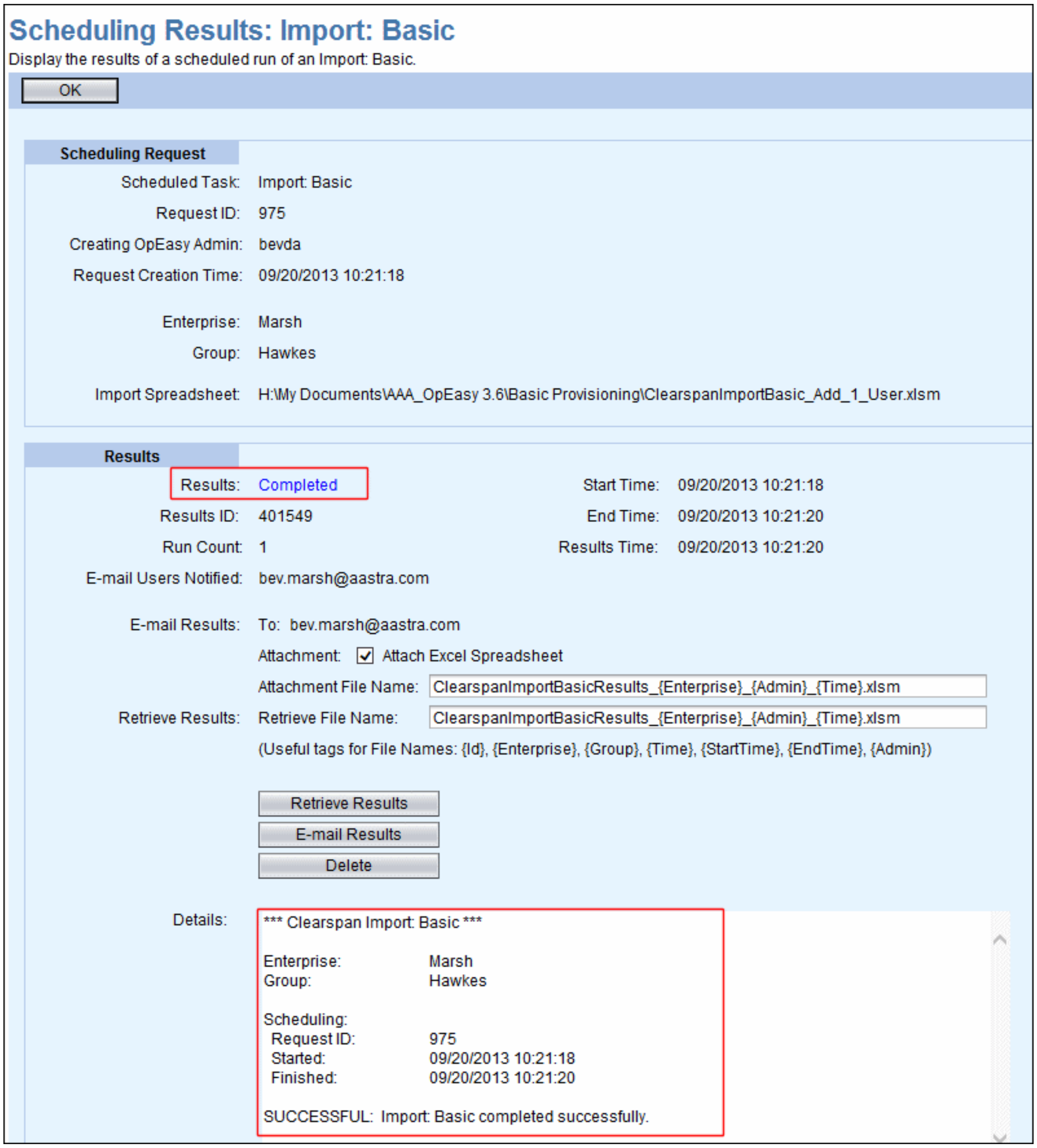


Figure 41 Scheduling Results – Basic Import

8.2 Restarting a Scheduled Import

1) From the main menu, select **Provisioning** and then **Scheduling**.

2) Click on the **Edit** link in the row of the schedule you want to edit. The Scheduling Request: Import: Basic page displays. The spreadsheet is already chosen. The status is marked as “Finished”.

3) Click **Restart Import**. The Import restarts.

8.3 Deleting a Scheduled Import

1) From the main menu, select **Provisioning** and then **Scheduling**.

2) Check the **Delete** box next to the schedule(s) to delete.

3) Click **Apply** and then **OK**. The schedule(s) are deleted from the list.